

Medical Tourism Survey Results

By Tony Staffieri

When ISAPS first published its "Guidelines for Plastic Surgery Tourism" in 2006, we were the first medical organization in the world to address what was seen as an emerging and important development. The trend has grown into a vast industry with global organizations joining the discussion: news media, government organizations, and entrepreneurs. Surgeons and patients have both become stakeholders in Medical Tourism. At gatherings around the world, the subject has been addressed in various ways, but no one had collected the views of the plastic surgery community until now.

Our most recent *ISAPS News* Survey asked about plastic surgery tourism. Over 1,300 surgeons responded, representing 7.3 % of our readers or approximately 5.3 % of all plastic surgeons in the world. The responses we receive to *ISAPS News* surveys continue to be statistically significant. Here is what our survey found:

Of the surgeons who replied, the largest percentage came from Western Europe (23%), followed by the United States (15.4%), and Brazil (10.4%). These are predictable response rates. What we found interesting was that Eastern Europe also had a response rate of 10.4%, while for Mexico which is on the top 10 list for medical tourism, the response rate was only 4.3%. In Asia the response rate was 7.4% -- considerably outpacing Mexico.

Surgeons practicing more than 20 years accounted for 42.7%. Surgeons practicing in private clinics led the responses with 32.9%. The preference of medical tourists going to smaller facilities was further supported by the number two choice of doctors who have private offices and perform surgeries in local hospitals (26.1%) followed by hospitals under 499 beds (16.6%).

When we asked how readers interpret the growth of medical tourism, 56% consider it today's reality; however, 25.4% think medical tourism is a dangerous trend. Just under 16% see medical tourism as a good opportunity to grow their practice while only 3% think medical tourism is unethical.

When we asked how surgeons attract foreign patients to their practice, the leading response was professional and patient referrals (48%). However, 39% replied, "I don't." This is an interesting statistic and a clear indication that medical tourism is not for all practices.

One response area that we thought was important to explore is marketing. Of the responding surgeons, 10.6% indicated that they use marketing (i.e., advertising) as a

way to secure foreign patients to their practice. Of this group, we found that 100% of Brazilians, Western and Eastern Europeans, and Americans responding to this question used marketing in some form. If anyone doubts that marketing is an important part of the medical tourism trend, these statistics indicate that we need to keep an eye on marketing trends, developments and ethics.

When we asked what percentage of patients came to a practice from outside the immediate geographic area (city, state or province), we learned that 46% of all surgeons treated at least 10% of their patients from outside their area. For 20% of patients outside the area, the response rate was 19.7% and for 30% outside the area, the response rate was 13.4%. Interestingly, 6.1% of all respondents said that at least 50% or more of their patients came from outside their own geographic area.

Another 57% of surgeons told us that 10% of their patients come from outside their country. Those who responded "I don't know" to this question totaled 24% -- the second highest response rate. Conversely, doctors who did not know the number of patients from outside of their city state or province, was a much smaller percent (9.8%). For practices with 20% of patients coming from outside the country, 8.3% of doctors indicated this was the case. This percentage was followed by 2.9% of doctors who calculate that 30% of their patients come from outside the country.

We asked surgeons specifically, "Do you market your practice for medical tourism?" A resounding 57% replied, "Never." However, 18% indicated that they were considering some kind of marketing for 2009. A smaller number said they use their own print marketing devices, as well as the website (13%). Additionally, 12.2% noted that they use marketing when there was some special opportunity to promote.

We found that a number of respondents are collaborating with hotel chains and medical tourism organizations. While some found that using good photos on their websites was an attraction, others depended on travel agents or marketing collaborations with their hospitals. When we asked surgeons if they currently paid a flat rate or percentage commission to tourism companies or others for referrals, an overwhelming percentage (90.7%) said no and 9% said yes. When we asked, "Do you now, or would you consider, paying a flat rate fee or percentage commission to a travel agent, other medical professional, medical facility, or other referring source for plastic surgery patients?" the answers show there are some changing attitudes among surgeons regarding fees paid for referrals. Of the doctors responding, the highest percentage (59.7%) said, "Never." However, 29.2% of respondents said that it depends on the agreement. Reflecting the difficult financial times we see coming, 7.4% said they were considering it for 2009.

On the topic of managing post operative care of foreign patients, 55.3% noted that they kept these patients under their direct care in their own clinic until the surgeon decided they could be released. Seeing patients in an outpatient capacity for 2 to 3 days was favored by 20.6% of surgeons. Surprisingly, 14.9% of surgeons had no policy regarding post operative care, while only 6.5% of surgeons referred their patients to other doctors they knew in their patient's hometown. One half of one percent said they left it to the travel agent.

Regarding how patients find surgeons, the tried and true method of referrals is alive and well as 65.5% of surgeons said that medical tourism patients were referred by doctors or other patients they had cared for. Technology is beginning to impact how doctors find new patients. In 18.3% of the responses, surgeons reported that the website was their best source for new patients. Still others noted that various combinations of websites, patient message boards, hospital advertising and outreach helped bring patients to their practice. One doctor even noted that an equipment manufacturer was a source of referrals.

Beyond the advertising, marketing and commission questions lies the important concern of patient safety and follow-up. When we asked doctors what they do when complications result with foreign patients after they return home, 51.1% said they contact plastic surgeons they know in the hometown of their patient; 24.2% make arrangements in advance to coordinate aftercare with another surgeon in the patient's home area. However, 22% of patients are on their own when complications occur. Doctors who responded that they never know what happens to their patients made up 11.1% of the answers and doctors who noted that their patients find their own surgeons accounted for the 11% of responses for a total of 22.1% of patients who had no further contact with the operating surgeon. In 2.5% of the responses, surgeons noted that the medical tourism company takes care of these complication situations.

Clearly, doctors who treat foreign patients are aware that complications can arise in as little as four or five days and some as long as a month after surgery. Depending on the procedure and the doctor's experience, many *insist* that patients who come to their practice from foreign countries must stay at least 10 to 30 days. We saw an underlying theme from doctors who feel there is an urgent need for a workable solution to this problem.

We found that 75.3% of doctors are paid in full or in part with cash with an additional 45% paid in full or in part by credit card. Although the response rate having to do with payment by medical tourism companies was quite small, we found it interesting that 3.9% of doctors are paid by the medical tourism company and 1.4% are paid by the medical tourism company at the end of the month -- inferring that the doctor is an *employee* of the medical tourism company rather than an independent surgeon.

We asked surgeons if they thought that plastic surgery tourism is safe as it is currently practiced. The leading answer was yes, they thought it was safe under proper procedures and with the appropriate controls (47.2%). However, 17.5% of respondents did not think it was safe, demonstrating that there is great diversity among doctors on this issue.

Underscoring the coming trend and major concern in this field, 11.9% of surgeons agreed it was safe only when there was a coordinating doctor to assist the patient when they returned home. And finally, showing the concern doctors have with medical tourism operators, 6.4% noted that it is inappropriate to have medical tourism operators involved.

How can ISAPS ensure patient safety when it comes to medical tourism? By an overwhelming majority, 73.7% of surgeons want ISAPS to be a source of information to the public for safe facilities and surgeons. Additionally, 57.4% want ISAPS to provide public education through the media. Proving that credibility is currency, 42.4% of doctors want some accrediting process for surgeons and facilities that practice safe methods. By cataloging complaints about unethical or bad outcomes, 38.5% of doctors thought ISAPS could really make a difference. A number of respondents urged ISAPS to create committees, banks of information and other resources to help both patients and doctors navigate this very complicated question.

Finally, we asked surgeons if they thought that plastic surgery tourism insurance was a good idea. Nearly one half of responding doctors (45.6%) noted that if it were available they would *recommend* it to their patients. While 33.8% did not think insurance was important, 15.1% of doctors said if it were available, they would *require* their patients to buy it. And of all doctors, 14.7% would like some form of plastic surgery tourism insurance for their own practice.

Conclusions.

Plastic surgery tourism is not a passing fad. It is definitely a consumer alternative that is here to stay. What we have seen from the doctors who've taken the time to respond to this survey is that there is definitely an increase in plastic surgery tourism, and a real need for information, guidance, care and protection of our patients.

For those readers interested in finding out more information about Medical Tourism, we refer you to a recent publication produced by Deloitte entitled, "Medical Tourism, Consumer in Search of Value." For more information on this publication contact:

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